User Attitudes and Vendor Approaches to Systems Integration

INPUT

User Attitudes and
Vendor Approaches to
Systems Integration

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**Systems Integration/Professional Services
Programme—Europe**
(SIP)

*User Attitudes and Vendor Approaches to
Systems Integration*

User Attitudes to Vendors Systems Integration

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Notes

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Europe
User Perceptions of Vendor Suitability

Equip. Vendors — 3.4

Independent SW Vendors — 3.4

Consultants — 2.7

0 1 2 3 4 5

Not Suitable   Very Suitable   INPUT

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7/1/93

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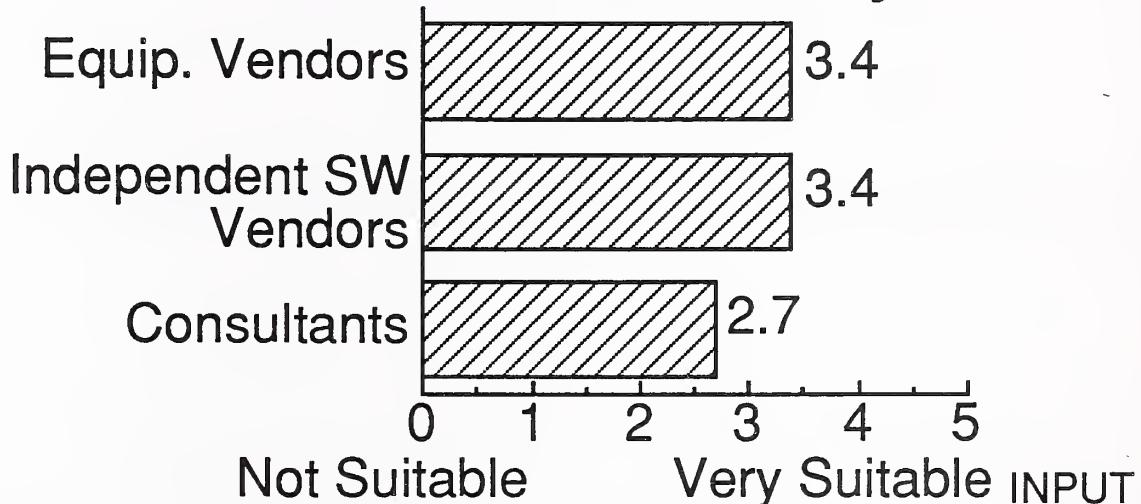
Germany

Perceived Vendor Suitability

Prof. Services
Vendors ///////// 3.6

Equip. Vendors //////// 3.3

Consultants ///// 2.0

0   1   2   3   4   5

Not Suitable   Very Suitable INPUT

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Notes

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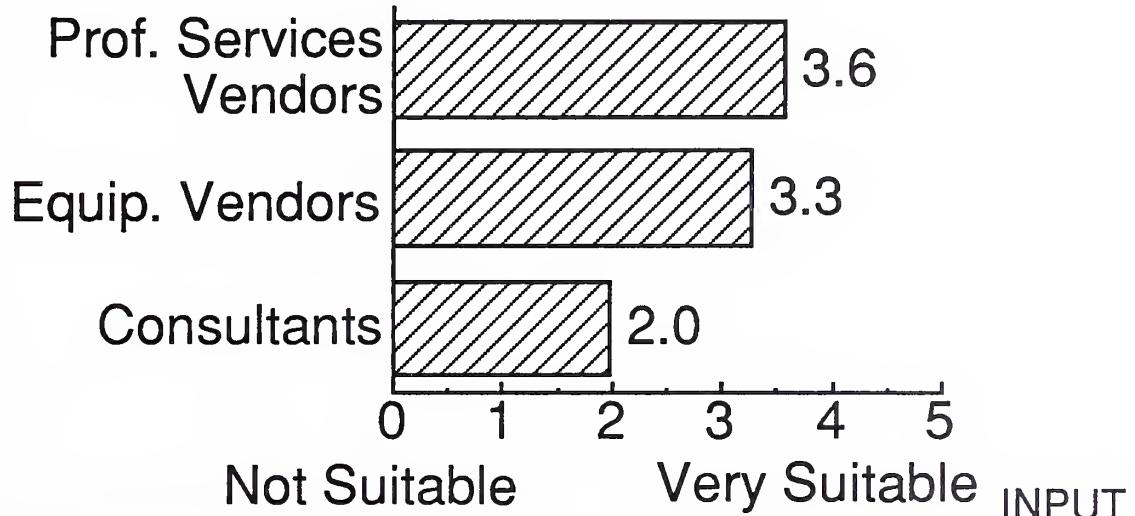
Perceived Effectiveness of SI Project Management

Prof. Services Vendors	3.5
Consultants	3.4
Equip. Vendors	3.0

0 1 2 3 4 5

Not Effective   Very Effective

INPUT

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Notes

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Perceived Value for Money

Professional Services Vendors — 3.5
Equip. Vendors — 2.7
Consultants — 2.7

0 1 2 3 4 5

Low Value   High Value

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Notes

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Achievement of Project Objectives

Selection of Most
Appropriate Vendor — 4.5 / 4.0

Achievement of
Business Benefits — 4.5 / 3.2

▨ Importance
▨ Success

Low   1   2   3   4   5   High

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6/8/93

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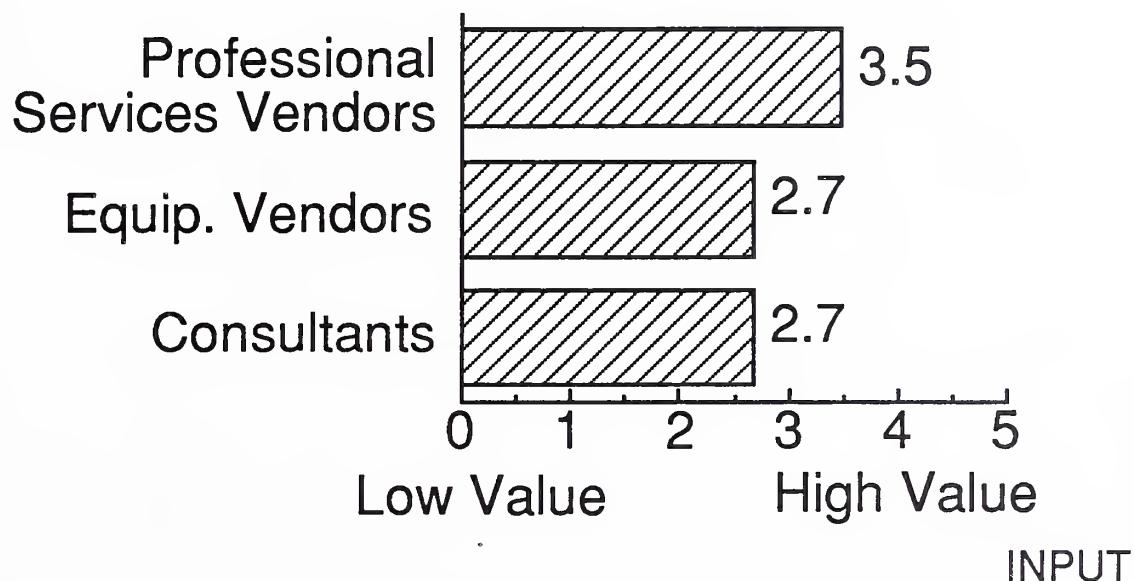
Systems Integration
Achievement of Project Objectives

Value for Money	4.1 / 3.5
On-Time Delivery	3.8 / 3.6
Effective Vendor Management	3.4 / 3.5

▩ Importance
☑ Success

1 2 3 4 5
Low   High
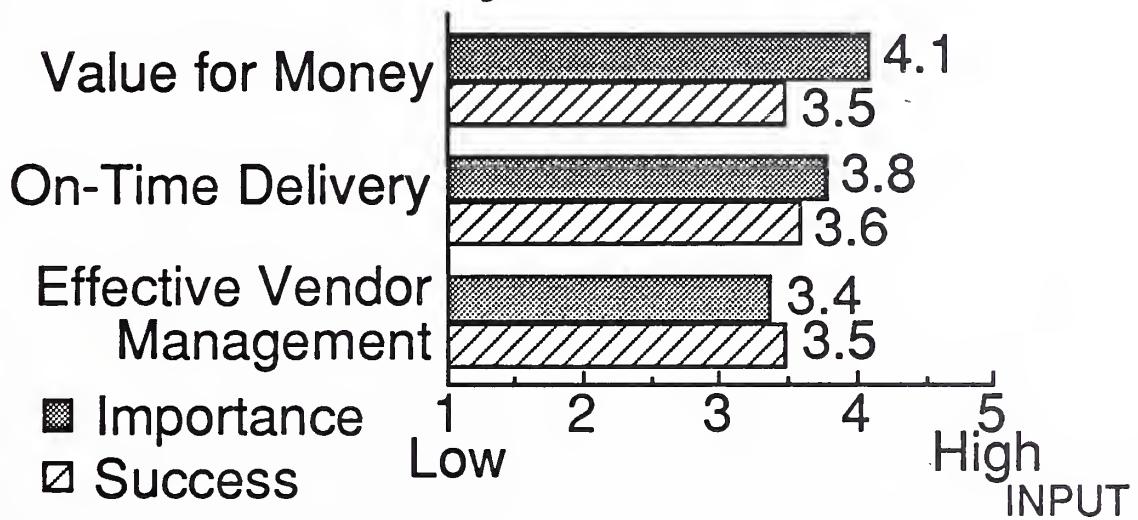
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Notes

User Integration
SI Projects

IS Mgmt. — 40
Senior Mgmt. — 35
End-User Management — 25

Proportion of Projects (%)

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Notes

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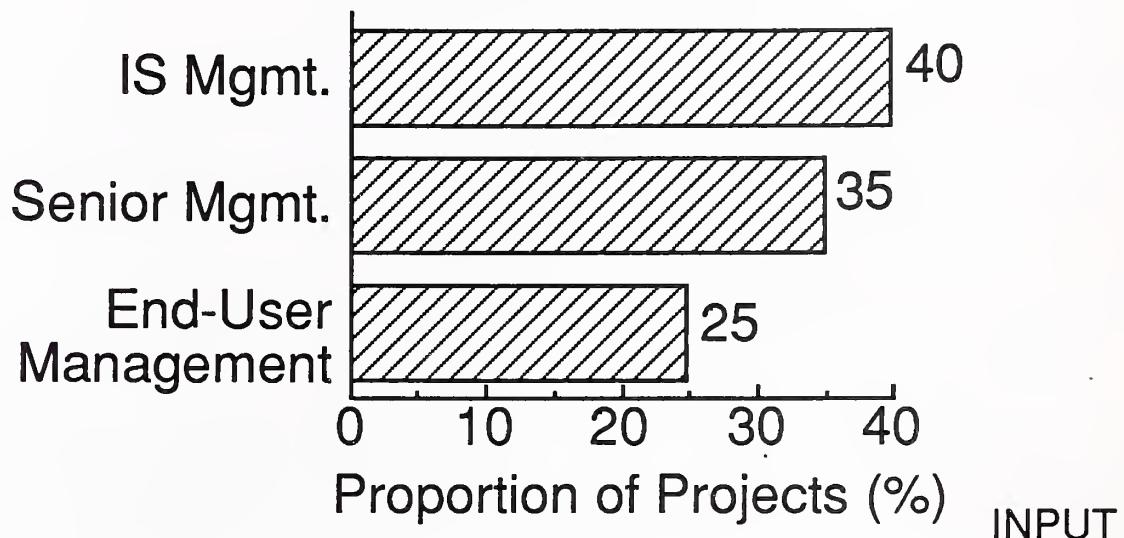
Role of External Consultants

Purchasing of Projects — 46

Identification and Definition of Projects — 31

Proportion of Projects (%)
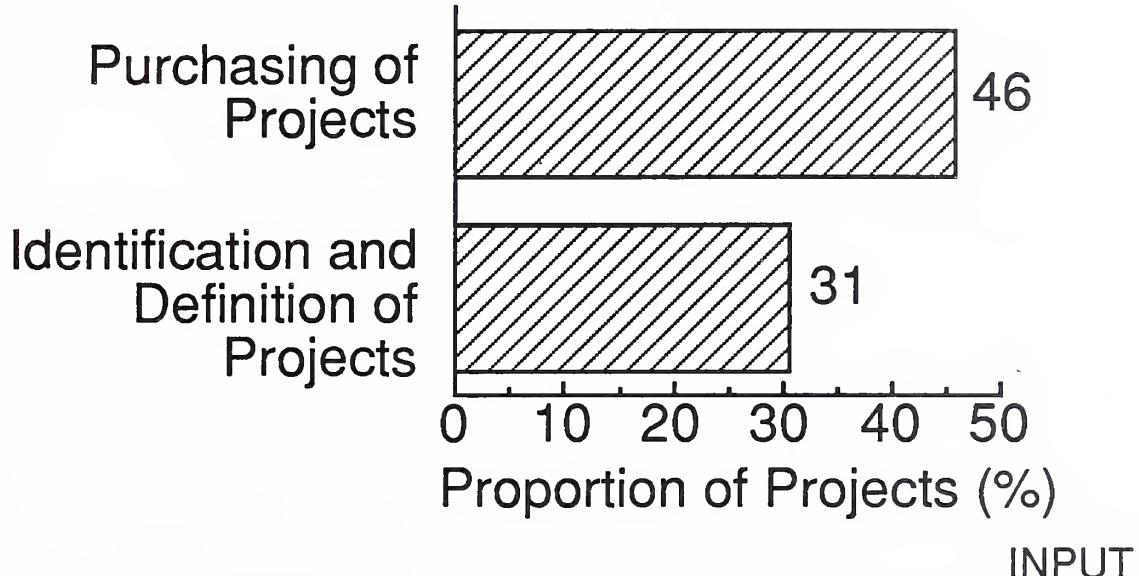
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Notes

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Complementary Workflow Purchases
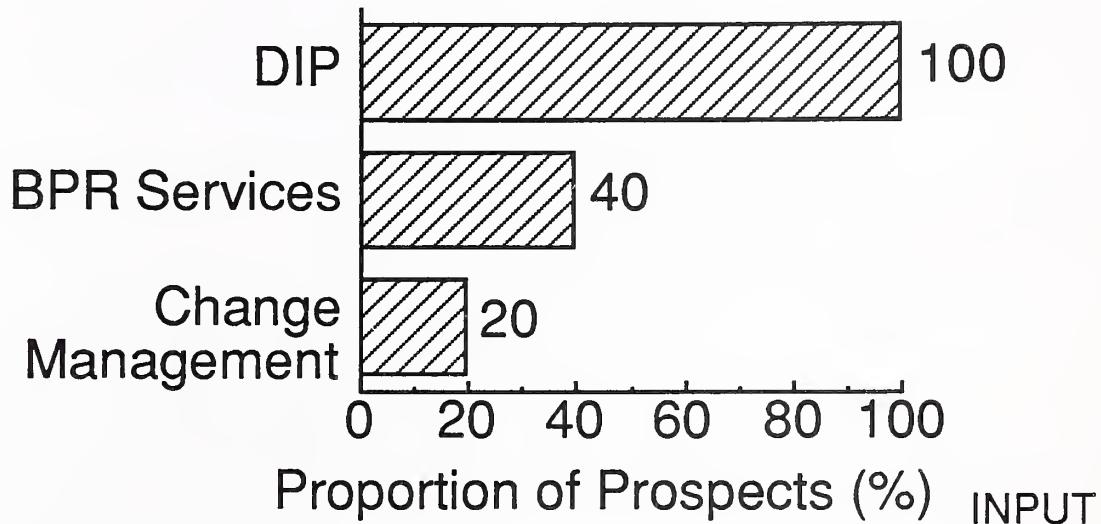
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Notes

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Systems Integration

Purchasing Process: Workflow

Stage	Key Influences
Decision to investigate workflow	Senior executives Department heads O&M/business strategy

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Notes

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Systems Integration
Purchasing Process: Workflow

Stage	Key Influences
Vendor identification/ information collection	IS department External consultants
Trial go/no go decision	Departmental heads Operational management

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Notes

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Projects by Equipment Type
Europe

Equipment Type	1993	1998	CAGR (Percent)
Unix-Based Midrange	1.7	4.6	23
PC or PC/LAN	1.2	3.6	25
Mainframe	1.4	2.6	13
Prop. Midrange	0.45	0.7	12

Value ($B)

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Notes

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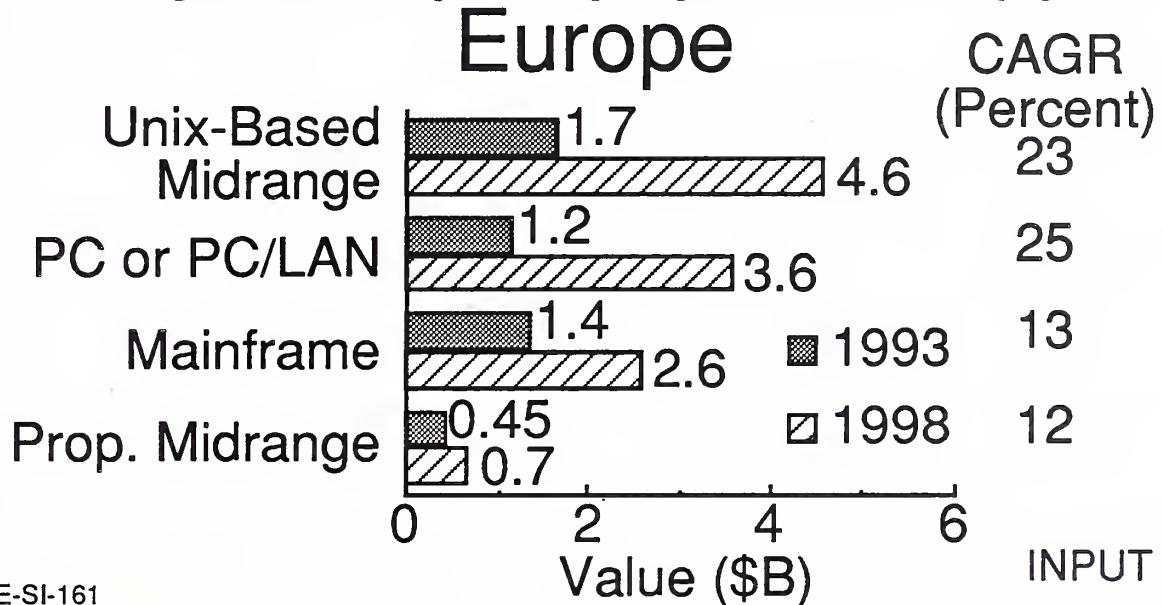
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Europe
SI Market by Component

	CAGR (Percent)
Software Products	1.2 / 5.0 — 32
Professional Services	2.1 / 3.8 — 12
Equipment	1.3 / 2.4 — 14

■ 1993
▨ 1998

0 1 2 3 4 5
Component Value ($B)
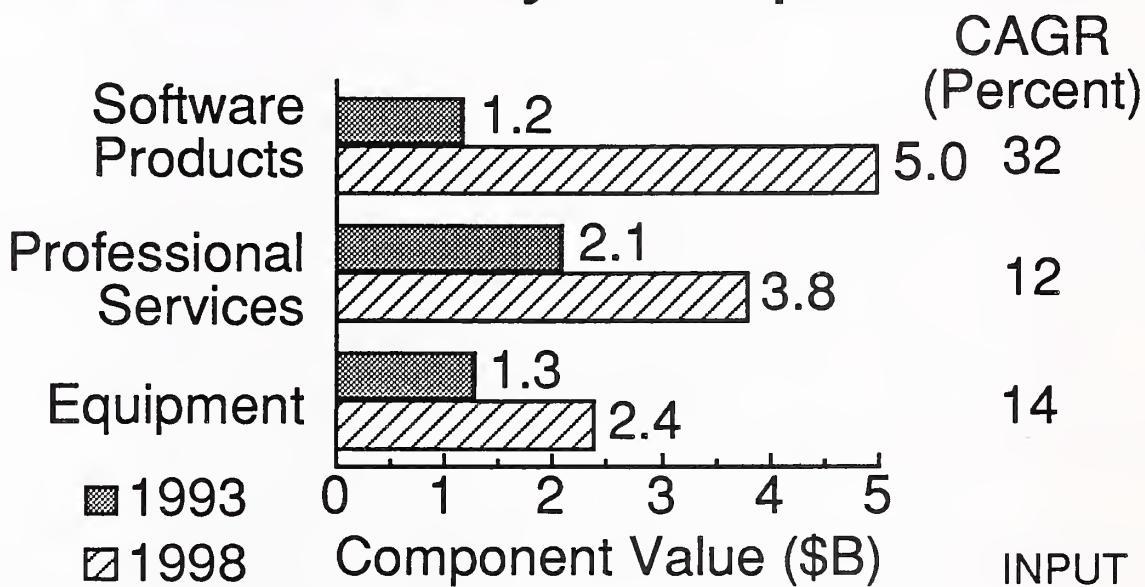
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Notes

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Germany
SI Industry Sector Growth

Sector	Ann. Percent. Growth, '93-'98
Utilities	20
Transportation	18
Telecommunications	17
Manufacturing	11
Financial Services	10

Ann. Percent. Growth, '93-'98 INPUT

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Notes

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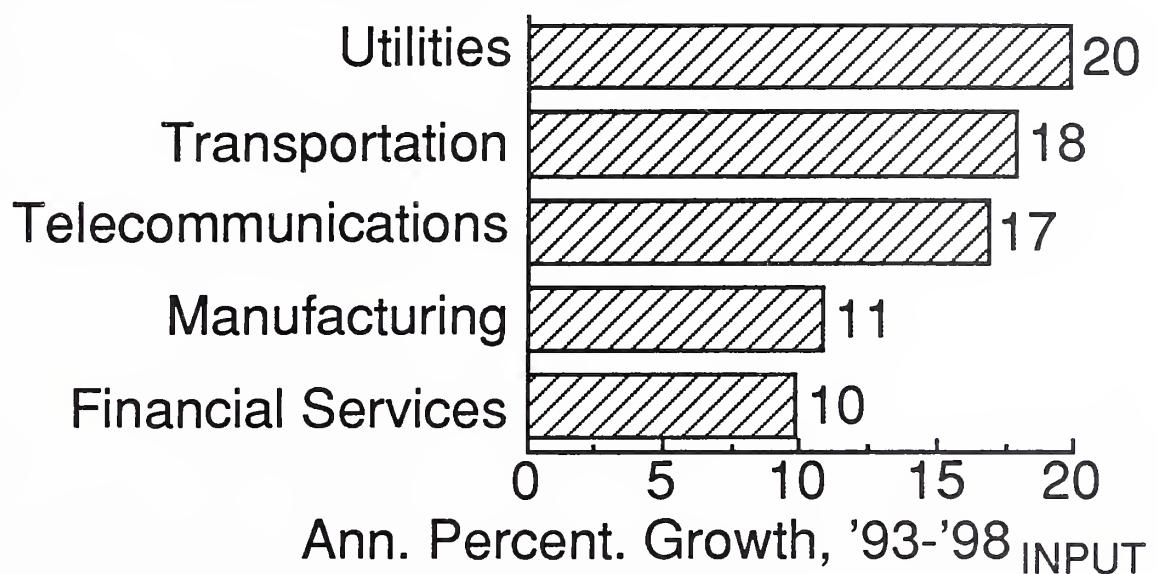
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SI, Europe

Leading Vendors, 1992

Company	Est. Rev. ($M)
IBM	750
Andersen Consulting	400
Cap Gemini Sogeti	390
Digital	285
Groupe Bull	240

INPUT

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Notes

INPUT

SI, Germany

Leading Vendors, 1992

Company	Est. Rev. (DM M)
IBM	180
SNI	150
Digital	70
Andersen Consulting	55
Bull	50

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Notes

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Vendor
Approaches to
Systems Integration

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Notes

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Issues for SI Vendors

- How to organise
- Access to senior executives
- Industry sector capability
- Business re-engineering
- The outsourcing approach

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Notes

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Unisys EAD Organisation Structure

Country General Managers

LOB General Managers

Information Services Director

Systems Integration
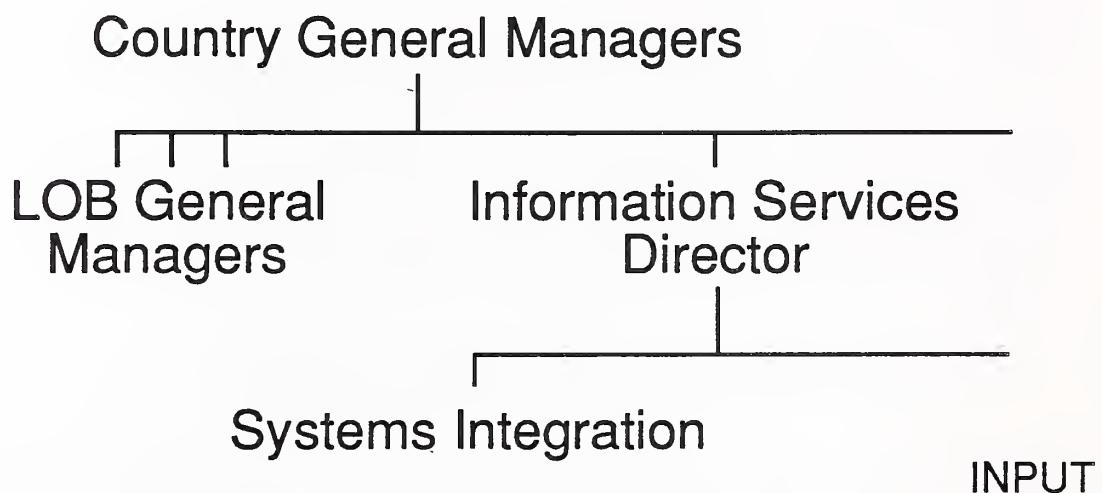
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Notes

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Unisys EAD Organisation Structure

Information Services
(Kevin Devaney)

Outsourcing   Education   Customer Applications

Systems Integration   Consultancy

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Notes

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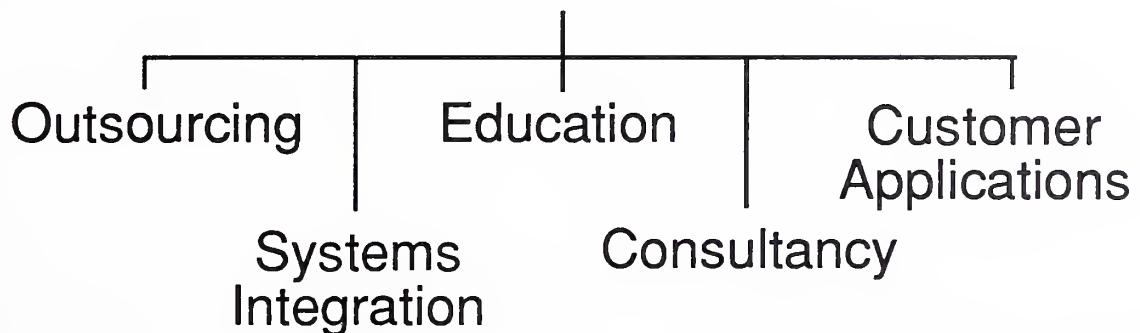
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Unisys EAD SI Organisation

SI Director
(R. Waite)

SI Business
Development
Director

SI
Consultant

SI Project
Manager

SI Project Office
Manager

SI Bid
Manager

INPUT

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Notes

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ICL (U.K.)—Organisation Structure

```
                          ┌──────────────┐
                          │     ICL      │
                          │     U.K.     │
                          └──────┬───────┘
          ┌──────────────────────┼──────────────────────┐
 ┌────────────────┐     ┌──────────────┐       ┌──────────────┐
 │ Government and │     │     ICL      │       │    Local     │
 │ Major Companies│     │  Enterprises │       │  Government   │
 └────────────────┘     └──────┬───────┘       │  and Health   │
                               │               └──────────────┘
   ┌──────┬──────────┬─────────┼────────┬──────────────┐
┌────────┐ ┌────────┐  ┌──────────────┐  ┌──────────┐
│Major SI│ │ Peritas│  │Consultancy and│  │   New    │
│ Project│ │ Limited│  │   Technical   │  │ Ventures │
└────────┘ └────────┘  │   Services    │  └──────────┘
      │                └──────┬────────┘       │
 ┌────────┐           ┌──────────────┐   ┌──────────┐
 │ CHOTS  │           │  Workplace   │   │   ICL    │
 │ Project│           │ Technologies │   │  Secure  │
 └────────┘           │   Limited    │   │ Systems  │
                      └──────────────┘   └──────────┘
```
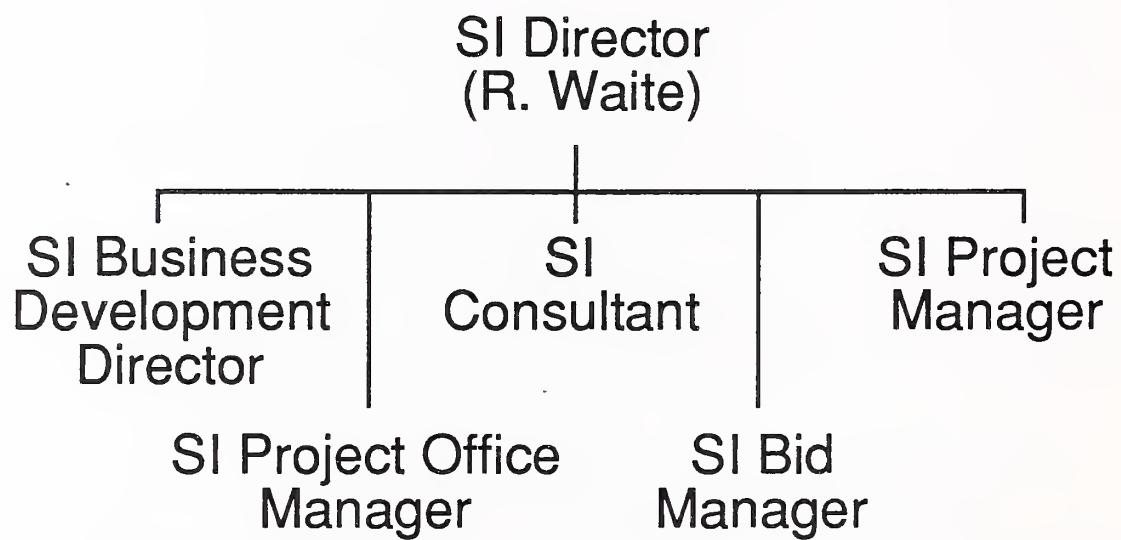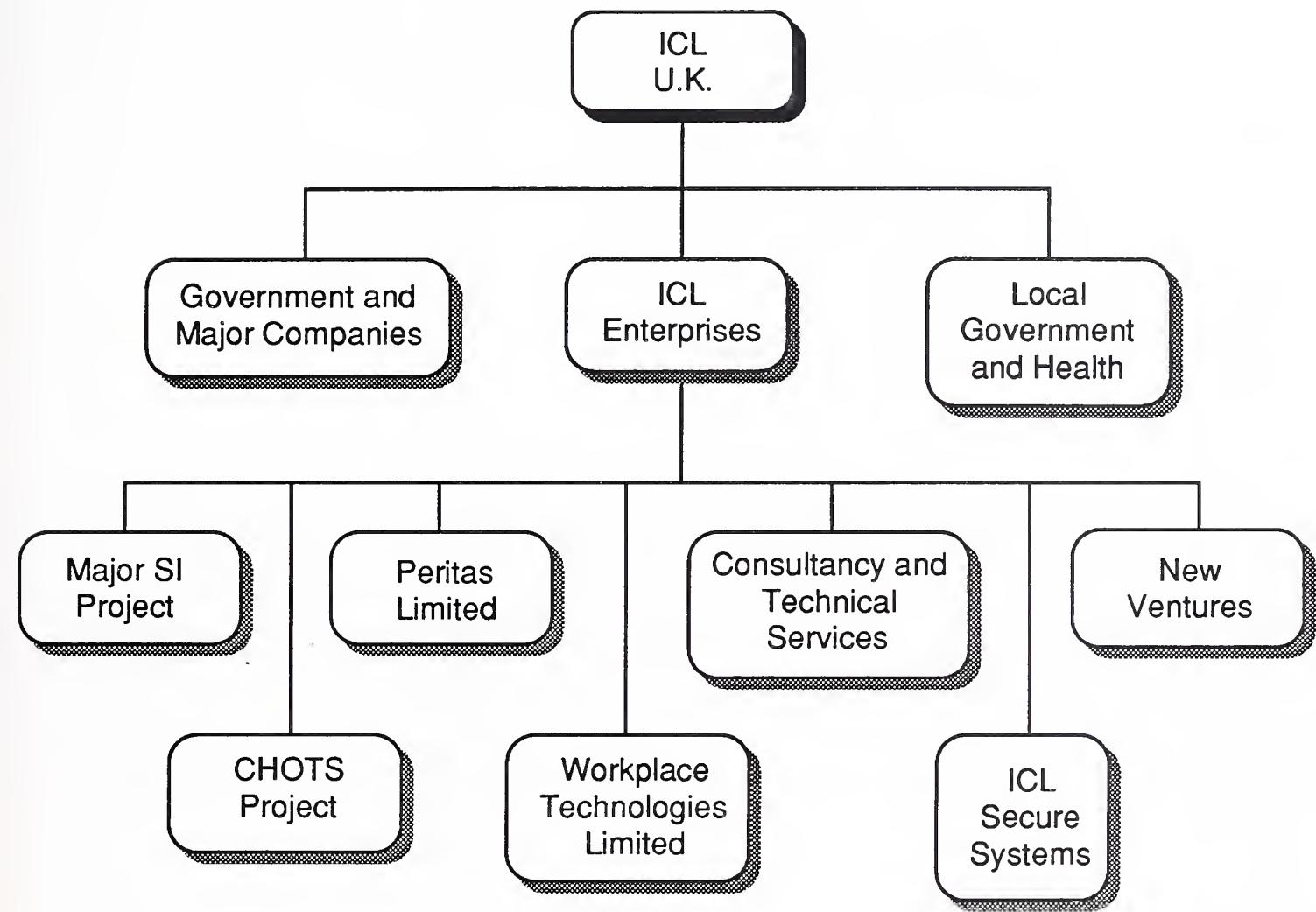
Source: ICL
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Role of Client Relationship Manager

Client
|
Business
Consultant — Client
Relationship — Information
Services
Consultant
Manager
/ | \
Specialist Product and
Service Teams
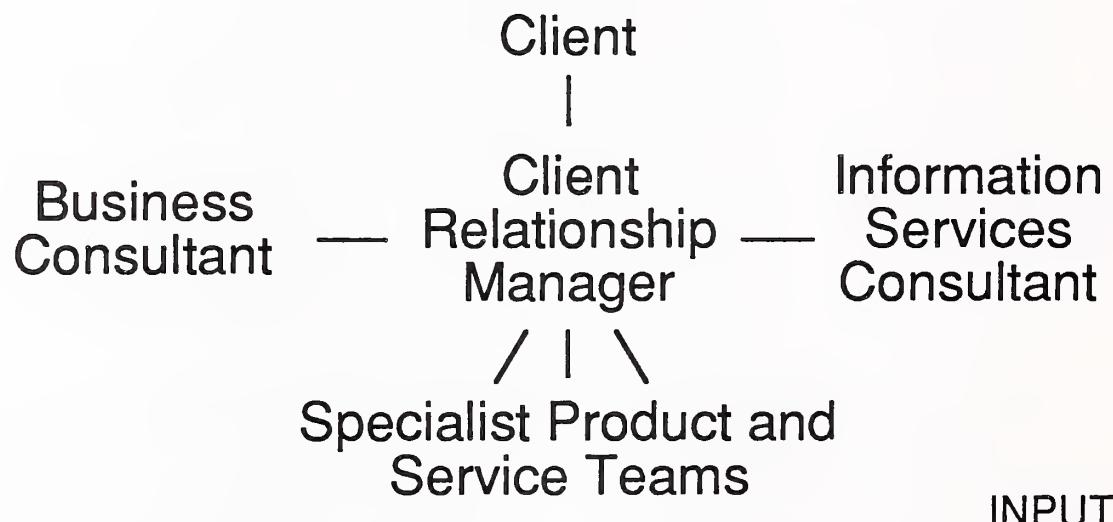
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Notes

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Digital SI Revenues, 1992

Sector	Proportion of Total (%)
Manufacturing	33
Financial Services	32
Public Sector	17
Telecommunications	11
Others	7
Total	100

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E-SI-185

Notes

INPUT

Sema Group: Revenues by Industry Sector (1)

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INPUT

Notes

INPUT

Sema Group: Revenues by Industry Sector (2)

CAGR
(Percent)

		CAGR (Percent)
Defence	53 / 97	35
Energy	30 / 55	35
Transportation	23 / 36	25

■ 1990
▨ 1992

Revenues (£M)
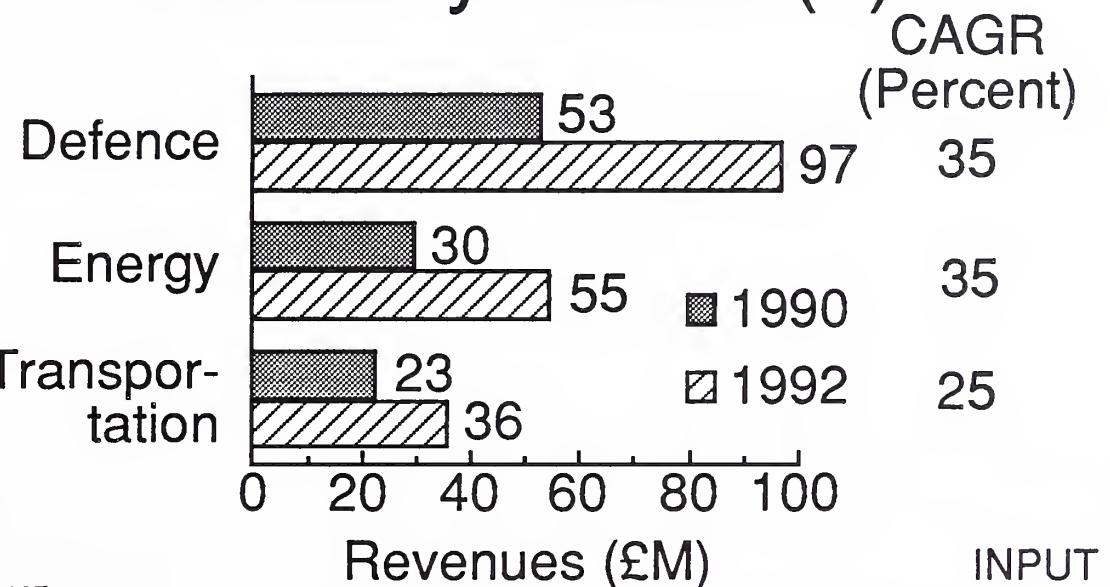
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INPUT

Notes

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Unisys—Country SI Focus

Country	Sectors
Germany	Airlines Air Traffic Control
France	Public Sector
U.K.	Police Force Systems Regional Electricity Companies
Portugal	Fishing Industry

INPUT

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Notes

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Digital Discrete Mfg. and Defence Business Unit

Industry Segments

- Automotive
- Aerospace
- Electronics
- Defence

INPUT

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Notes

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Digital Discrete Mfg. and Defence Business Unit
Solutions
- Manufacturing planning
- Manufacturing execution
- Engineering product Data management
- Defence logistics/intelligence

INPUT

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Notes

INPUT

Digital Financial, Prof. and Public Services Business Unit

Industry Segments

- Banking
- Insurance (except health)
- Other professional services
- Public administration

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Notes

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Digital Financial, Prof. and Public Services Business Unit

Solutions

- Retail branch systems
- Trading systems
- Workflow document management
- Registry applications

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Notes

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Strategic Business Areas (SBAs)

Location of SBA	Specialism
Paris	Telecommunications
London	Financial services
Germany	Manufacturing
Benelux	Distribution
U.S.	Oil and chemicals

INPUT

E-SI-193

Notes

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Typical Projects
BT Customer Systems

Client	Nature of Project
ICI	Global communications infrastructure
BP	Emergency control centre

INPUT

E-SI-194

Notes

INPUT

Typical Projects
BT Customer Systems

Client	Nature of Project
Mercantile Credit	Credit reference
DSS	STS programme
HM C&E	Customs freight handling

INPUT

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Notes

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Major Challenges for IS Depts.

Admin. Efficiency — 18
Operational Cost Reduction — 22
Comp. Advantage — 43

0 10 20 30 40 50

Percent of Senior Executives
Giving Attribute Score of 1 or 2 INPUT

E-IS-36

Notes

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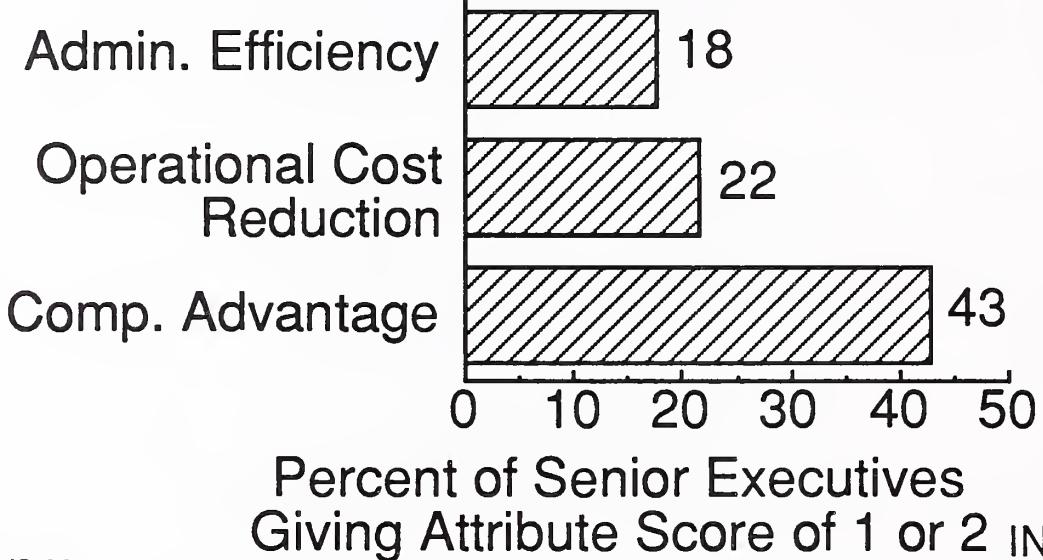
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EDS—Business Information Planning

Business direction

↓

Business initiatives

↓

Business process analysis

↓

IS assessment

↓

Business/technology integration
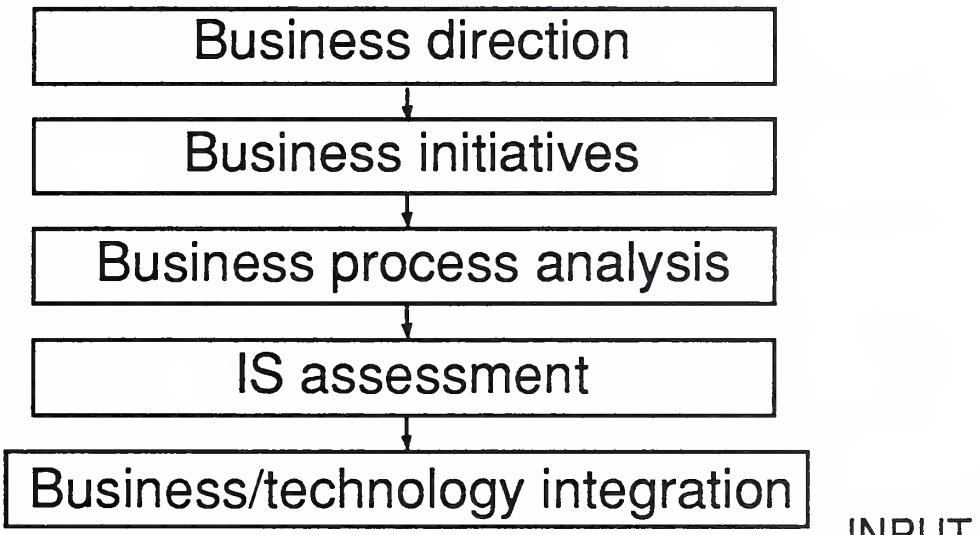
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Notes

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Gemini Consulting

- Business transformation through multidisciplinary projects

- Targeting Fortune 100

- European business transformation revenues of $75 million

E-SI-133

Notes

11/23/92

Range of Technology Perspectives

Weak Emphasis   Strong Emphasis

Enabler   Catalyst   Aggressive
(C&L)   (Andersen)   Exploitation
                                  (CSC)

INPUT

Notes

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Evolution of European Outsourcing

Business Operations

Applications Operations

Infrastructure Management

Mainframe   Midrange   PC   INPUT

E-OU-42

Notes

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Systems Integration, Europe
Vendor Positioning (1)

Pan-
European
Capability

IBM →

CGS ↗

Bull ——→

↑

Andersen

Sema Group —→ Consulting

Account Management Skills

INPUT

E-SI-94

10/13/92

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INPUT

Systems Integration, Europe
Vendor Positioning (2)

Industry Coverage (vertical axis)

IBM ↗
CGS →
Andersen ↗
Consulting

Sema Group →

Bull →

Access to "Building Blocks"

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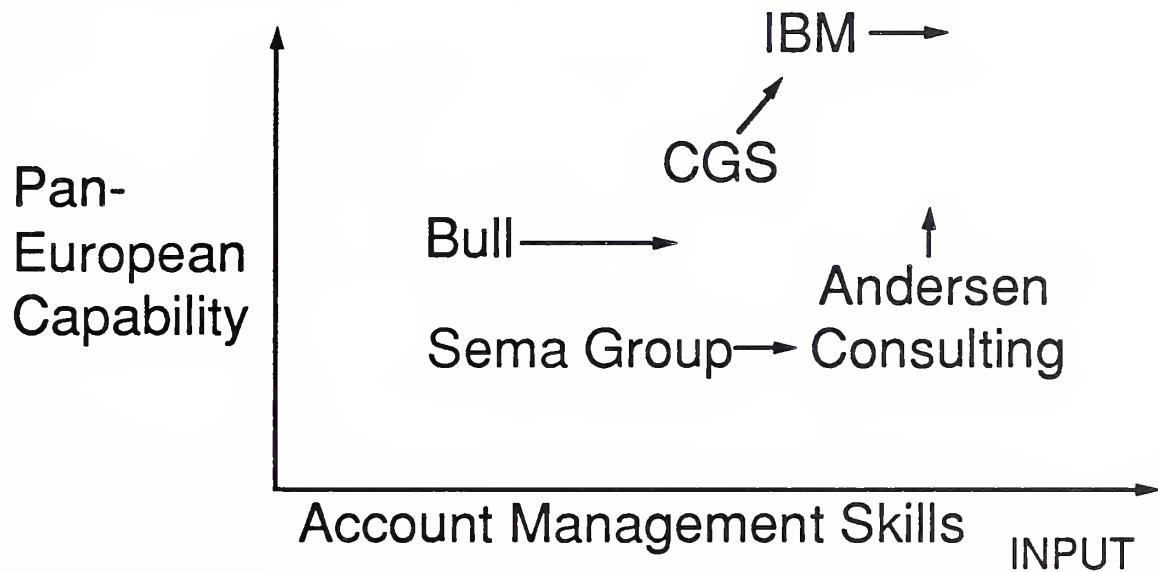
Notes

Systems Integration, Europe
Vendor Positioning (3)

E-SI-96
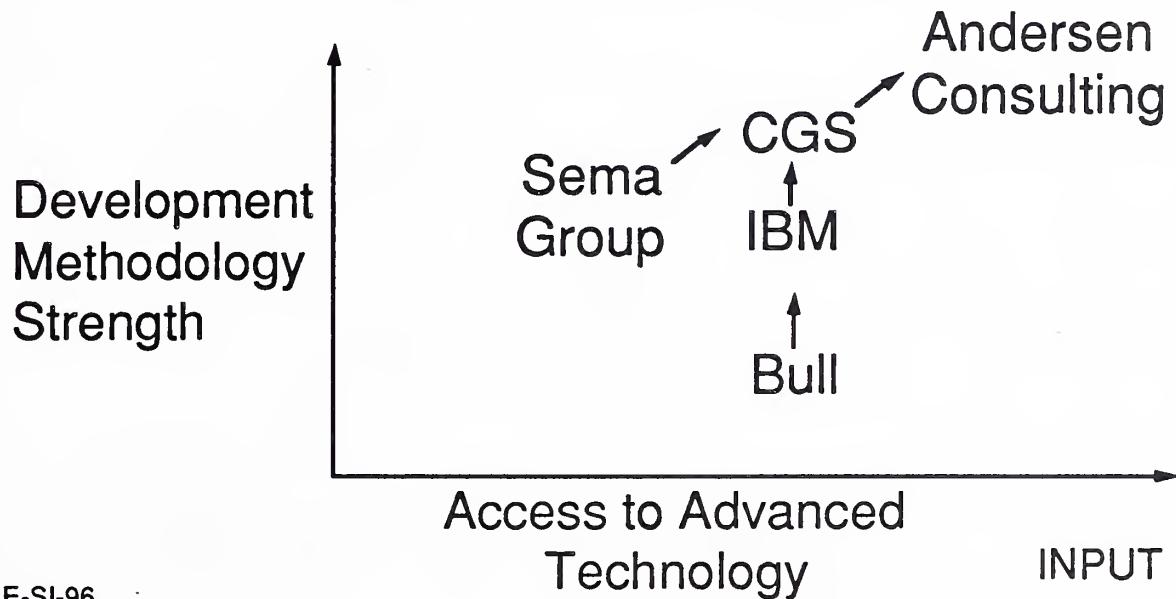
Notes

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Systems Integration
Vendor Positioning (4)

Business
Process
Re-engineering
Capability

Andersen
Consulting

CAP Gemini
Sogeti

IBM

Bull

Sema
Group

Outsourcing Capability   INPUT
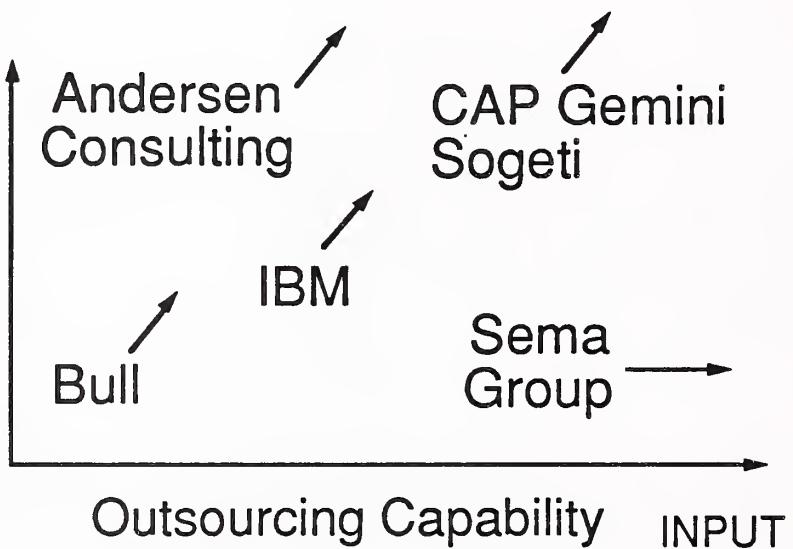
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- 9 Categories of Software and Services
- 7 Cross-Industry Markets
- The Worldwide Market (30 countries)

— EUROPEAN —

- Outsourcing
- Systems Integration
- Customer Services

— U.S. —

- Outsourcing
- Client/Server
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- IT Vendor Analysis
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